RMS360 Postaward User Guide

Accounts Log In and Password

1. What's the best browser to use with RMS360?
2. How do I reset my password?
3. How do I access my username?
4. How do I change my contact information in RMS360?

Roles in RMS360

1. What are the roles and responsibilities of the Principal Investigator (PI)/Researcher?
2. What are the roles and responsibilities of the Research Officer (RO)?
3. What are the roles and responsibilities of the Finance Officer (FO)?

Activations and Renewals

1. How do I submit an Activation?
2. For multi-year grants, what do I need to submit to renew my grant?
3. How do I submit a Renewal Application?

Payment Details

1. How do I add Payment Details?

Ethicals

1. How do I add an Ethical?

Terms and Conditions

1. How do I view the Terms and Conditions (T&Cs) of the award?

Milestones

1. How do I add milestones to my activation?
2. How do I make changes to my milestones after my award has been activated/renewed?

Monitoring and Reporting

1. How do I view when my reports are due?
2. How do I submit an Expenditure Report?

Budget Update

1. How do I request/submit a budget update?

No-Cost Extensions

1. How do I submit a No-cost Extension?

Transfers

1. How do I request a transfer?

Transition

1. How do I request a transition?

Termination

1. How do I complete the termination activity?

Intellectual Property

1. How do I add Intellectual Property?

Accounts Log In and Password

1. **What's the best browser to use with RMS360?**
   For the most optimal system functionality, we recommend using either **Google Chrome** or **Mozilla Firefox** as your browser when accessing RMS360.

2. **How do I reset my password?**
   If you forget your password, you may reset your password from the login page of RMS360 by selecting the "**Forgot your password**" link. Your username is your email address.

3. **How do I access my username?**
   If you forget your username, you may retrieve your username from the login page of RMS360 by selecting the "**Forgot your username**" link. Your username is your email address.

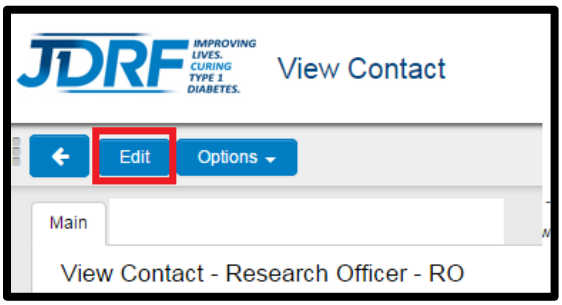
4. **How do I change my contact information in RMS360?**
   The following steps can be done by anyone who has an RMS360 login:

   Step 1. Log into RMS360.

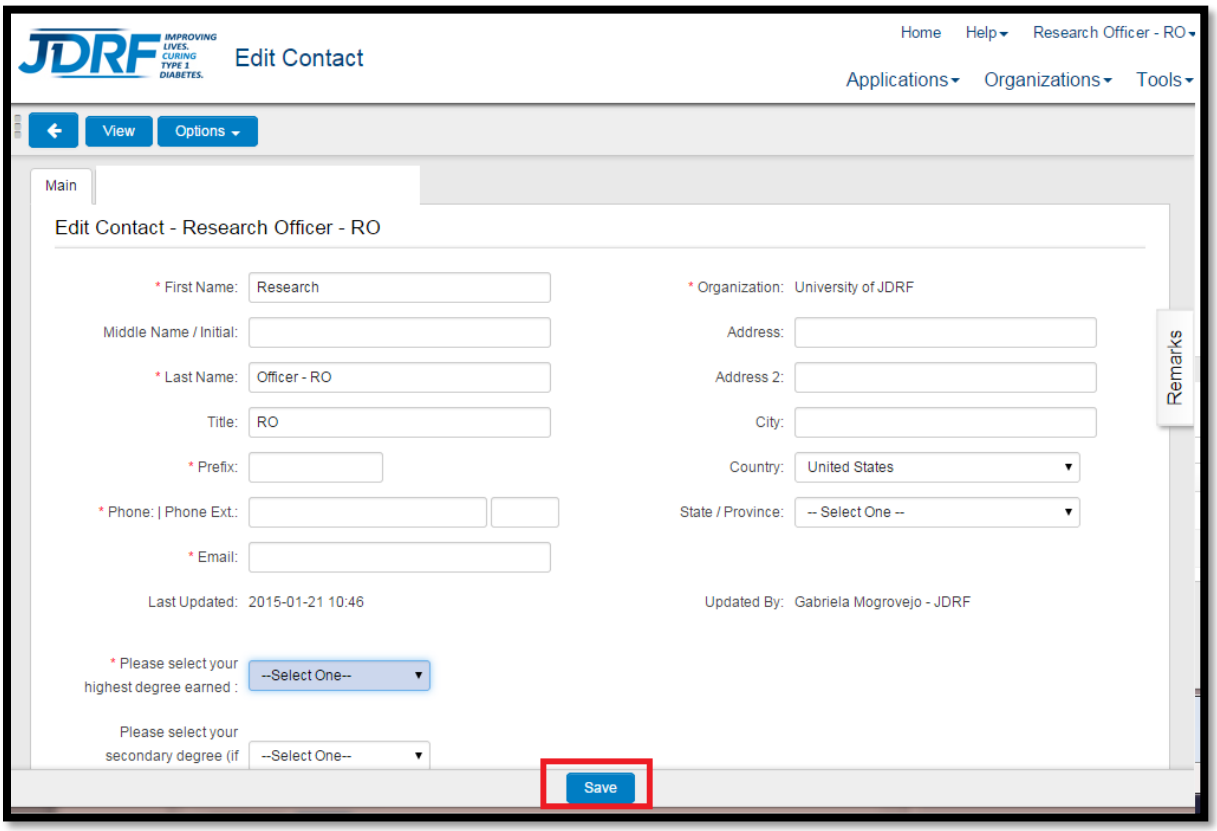
   Step 2. On the home page, locate your name in the upper right-hand corner.

Step 3. Hover your mouse on your name and a dropdown menu will appear. Click on 'My Profile'.

Step 4. After the page refreshes, click on Edit in the upper left-hand corner.



Step 5. Make the necessary changes and click on Save at the bottom of the screen.



Roles in RMS360

1. **What are the roles and responsibilities of the Principal Investigator (PI)/Researcher?**
   The Principal Investigator has access to all reporting materials in RMS360 for his/her grant(s). The PI may complete most sections of the activation and renewal and works with the Research Officer to formally submit to JDRF. In addition, the PI can complete and submit other reporting items in RMS360 as needed throughout the lifecycle of the award.

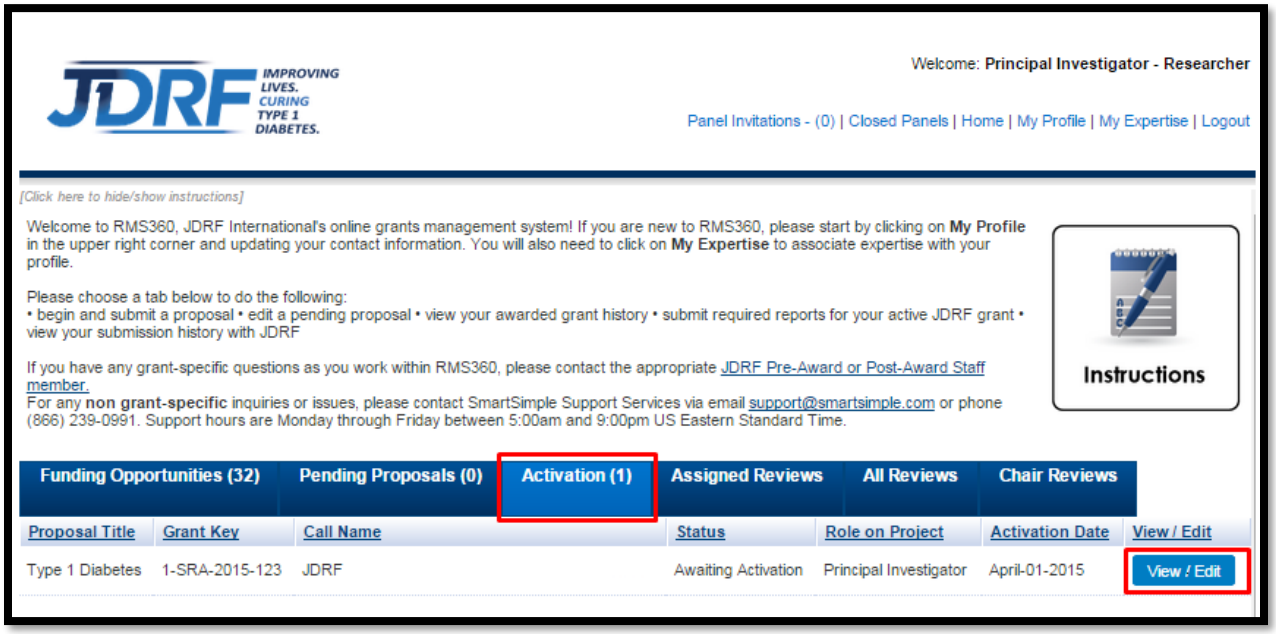
2. **What are the roles and responsibilities of the Research Officer (RO)?**
   The Research Officer has access to the activation and renewals and should work with the Principal Investigator and Financial Official to complete grant activations, renewals and expenditure reports as appropriate. For other reporting items, the RO should work with the PI as needed. In addition, the individual is required to complete the payment details for activations and renewals, certify that the information is accurate, and submit the reports.

3. **What are the roles and responsibilities of the Finance Officer (FO)?**
   The Finance Officer has access to expenditure reports for assigned grants. In this role, the individual is required to complete the expense column in the expenditure report, certify that the information included in the report is accurate, and submit the report to the Research Officer.

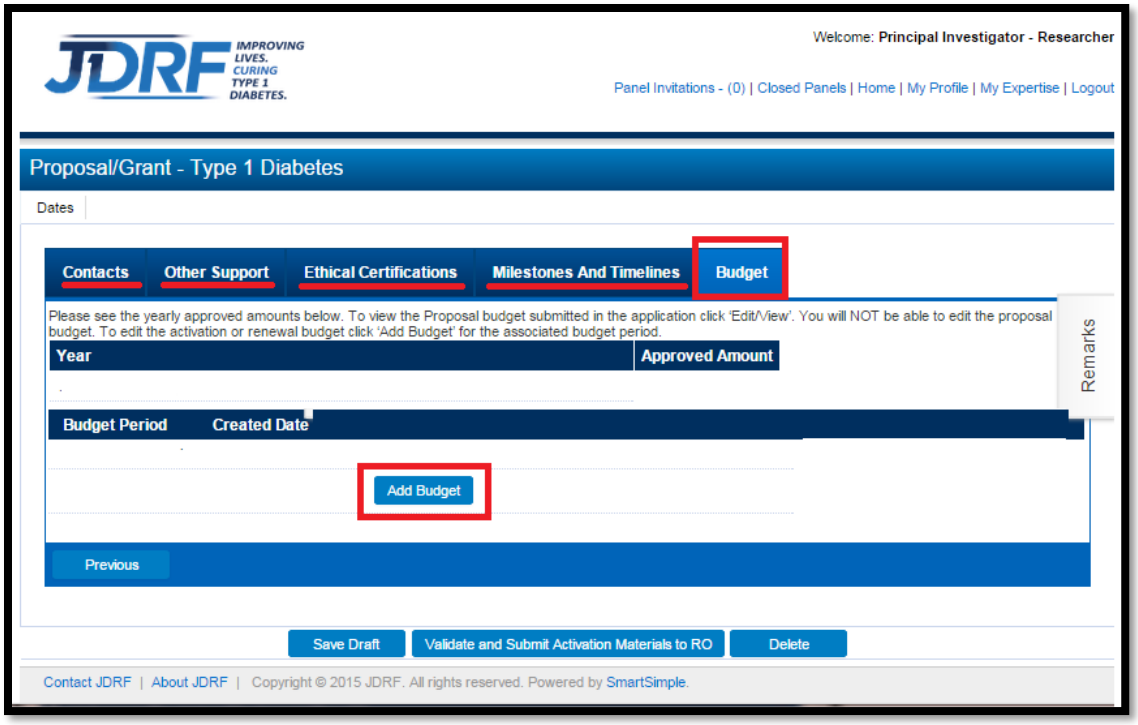
Activations and Renewals

1. **How do I submit an Activation?**
   Roles: The following steps are to be completed by the PI and RO.

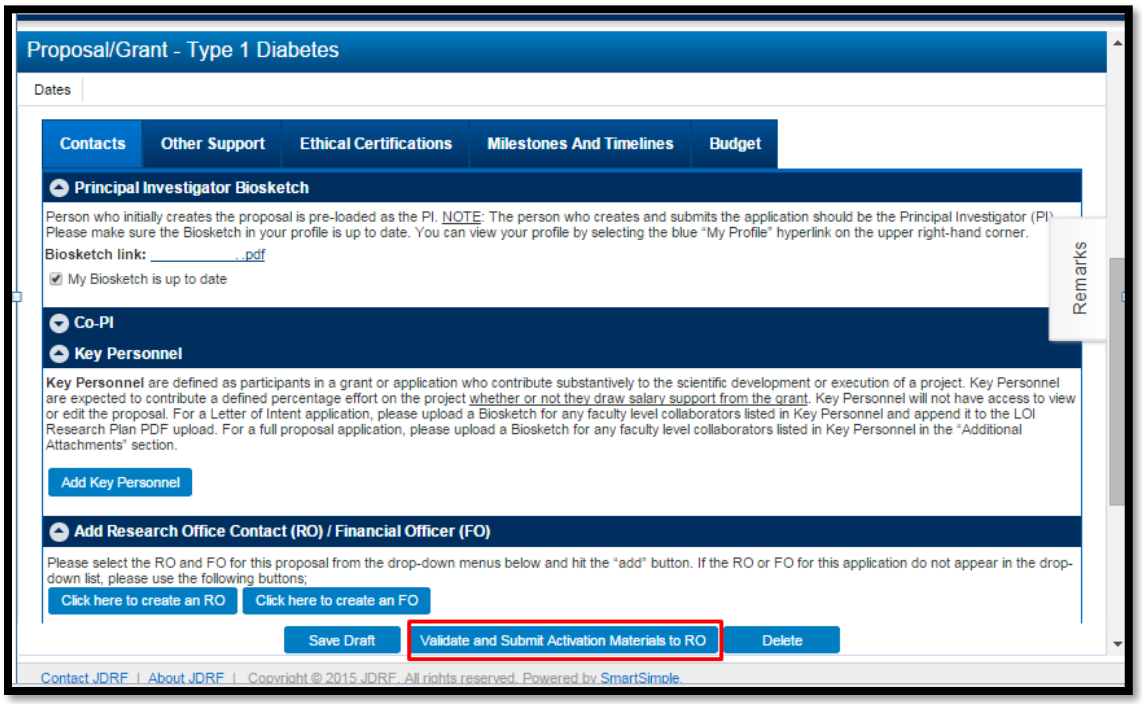
Step 1. The PI logs in to RMS360 and selects "Activation", and then selects the blue 'View/Edit' button.



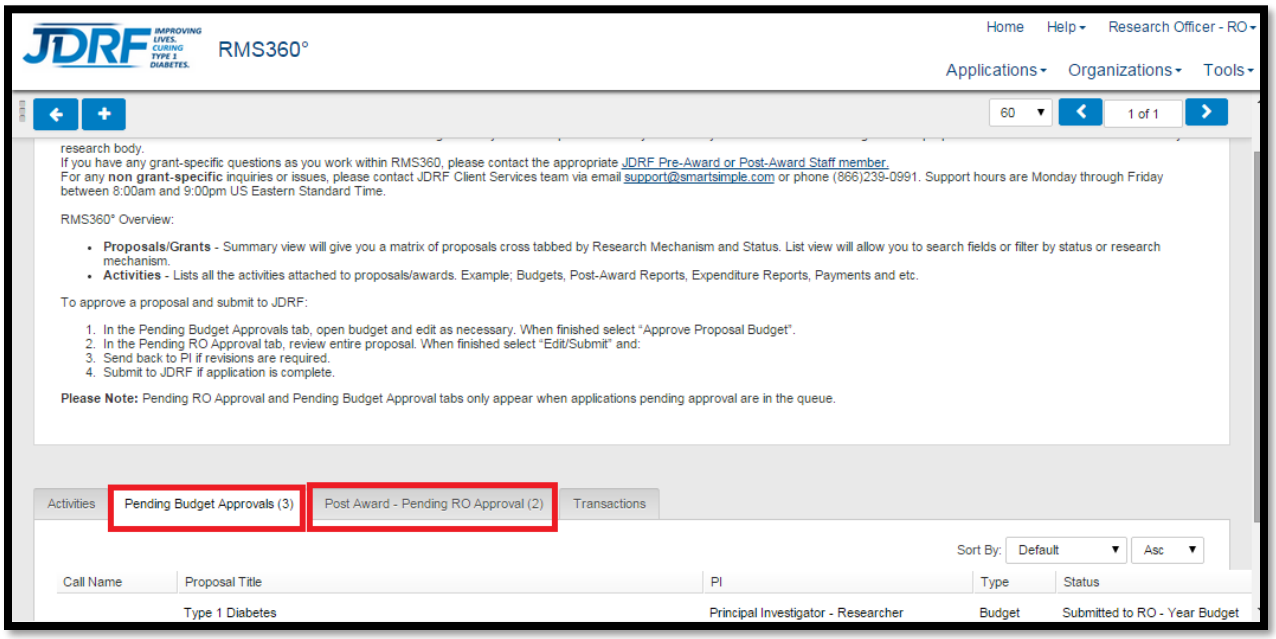
Step 2. The PI completes all the information requested on each tab – Contacts, Other Support, Ethical Certifications, Milestones and Timelines and Budget. Under the Budget tab, click on 'Add Budget' to add, complete and save the Year 1 budget.



Step 3. The PI clicks on the button at the bottom of the screen, "Validate and Submit Activation Materials to RO".



Step 4. The RO logs into RMS360 and completes the activation process by approving the Year 1 Budget and adding payment and audit details. See the tabs labelled, "Pending RO Approval", "Pending Budget Approvals" and the blue Edit/Submit button.

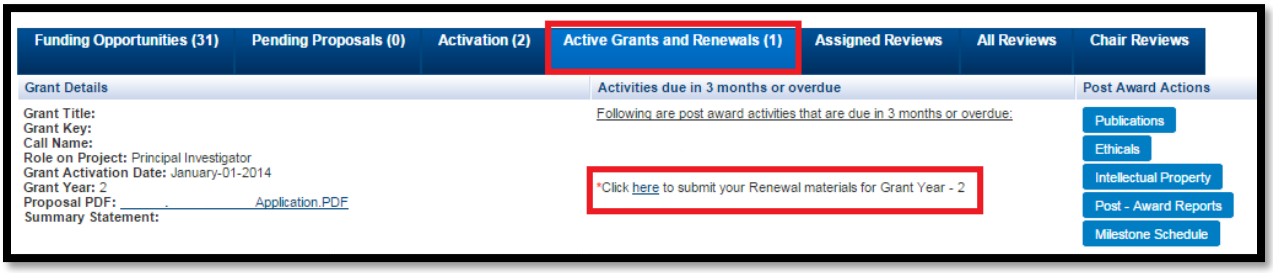


2. **For multi-year grants, what do I need to submit to renew my grant?**
   In order to renew funding for a multi-year grant, the following must be submitted:
   - PI must submit an Annual Progress Report
   - PI must work with the RO to submit a Renewal.
     - Note: the renewal starts in the PI's queue.

3. **How do I submit a Renewal Application?**

   Roles: The following steps are to be completed by the PI and RO.

   Step 1. The PI logs in to RMS360 and selects "Active Grants and Renewals"



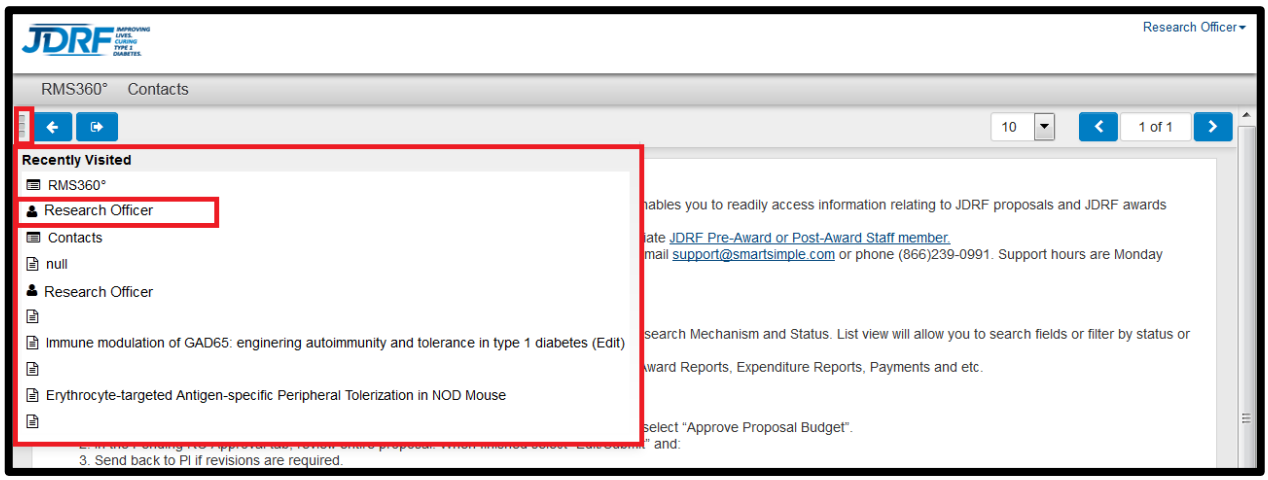
   Step 2. The PI locates and clicks the applicable renewal link under "Activities due in 3 months or overdue"

   Step 3. See question, "How do I submit an Activation?", and follow the steps starting at #2.

Payment Details

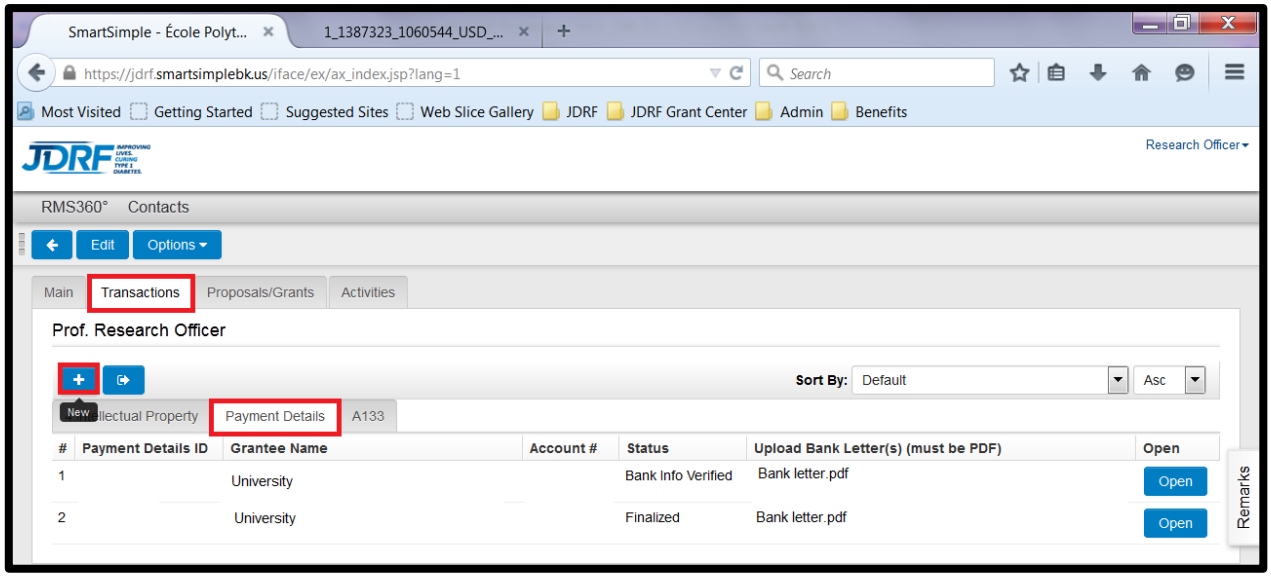
1. **How do I add Payment Details?**
   Roles: The following steps are to be completed by the Research Officer (RO).

   Step 1. First, hover your mouse to the left of the blue arrow button. A dropdown menu will appear. Click on the RO name.



   Step 2. Next, click on the "Transactions" tab, then the "Payment Details" tab.

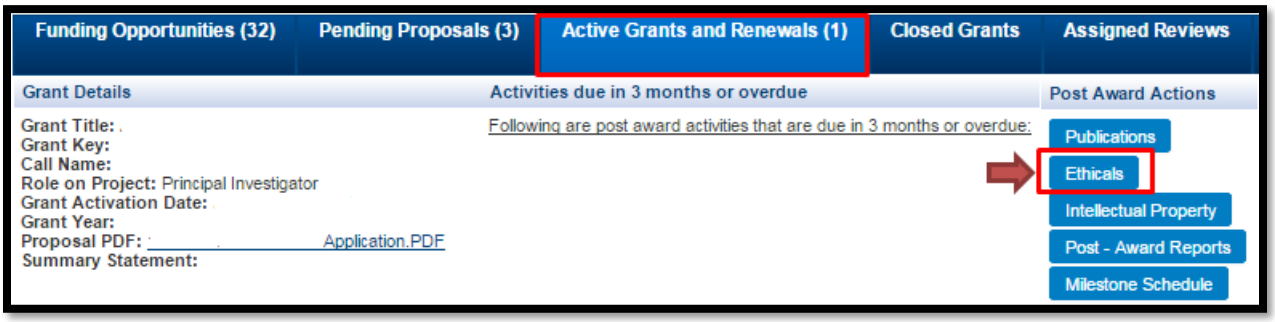
   Step 3. Select "New" [make sure you are clicking on the symbol, "+"]. A new window will open where you can enter new Payment Details. After you have entered these details, make sure to click "Save Draft". After saving these details, they will be available in the dropdown under the "payment details" tab when submitting activation/renewal materials (you should see the saved details instead of "select one").



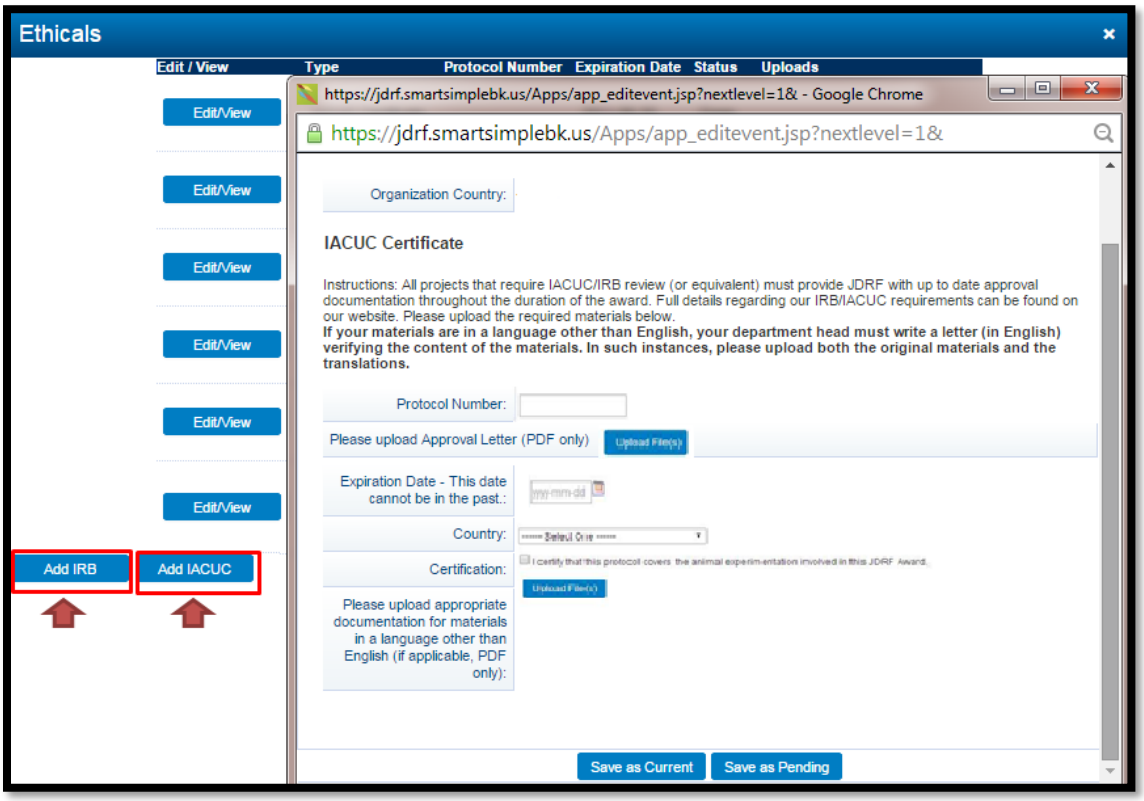
Ethicals

1. **How do I add an Ethical?**
   Roles: The following steps are to be completed by the Principal Investigator (PI):

Step 1. Select the Active Grants/Renewals tab and click on the blue Ethicals button on the right.



Step 2. After you click on the 'Ethicals' button, a new window will open. Complete the information, Upload the File and then click on "Save as Current" to submit. [Please note: The screenshot is for the IACUC form. For the IRB form, make sure you upload the approval letter, Study Protocol/Application, and if necessary, the Informed Consent form(s)].

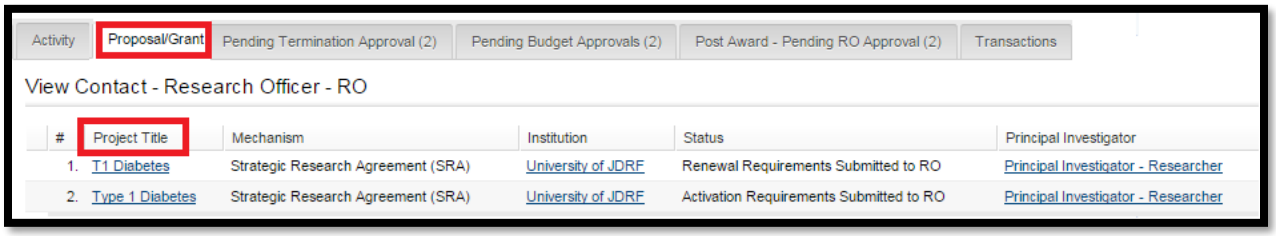


Terms and Conditions

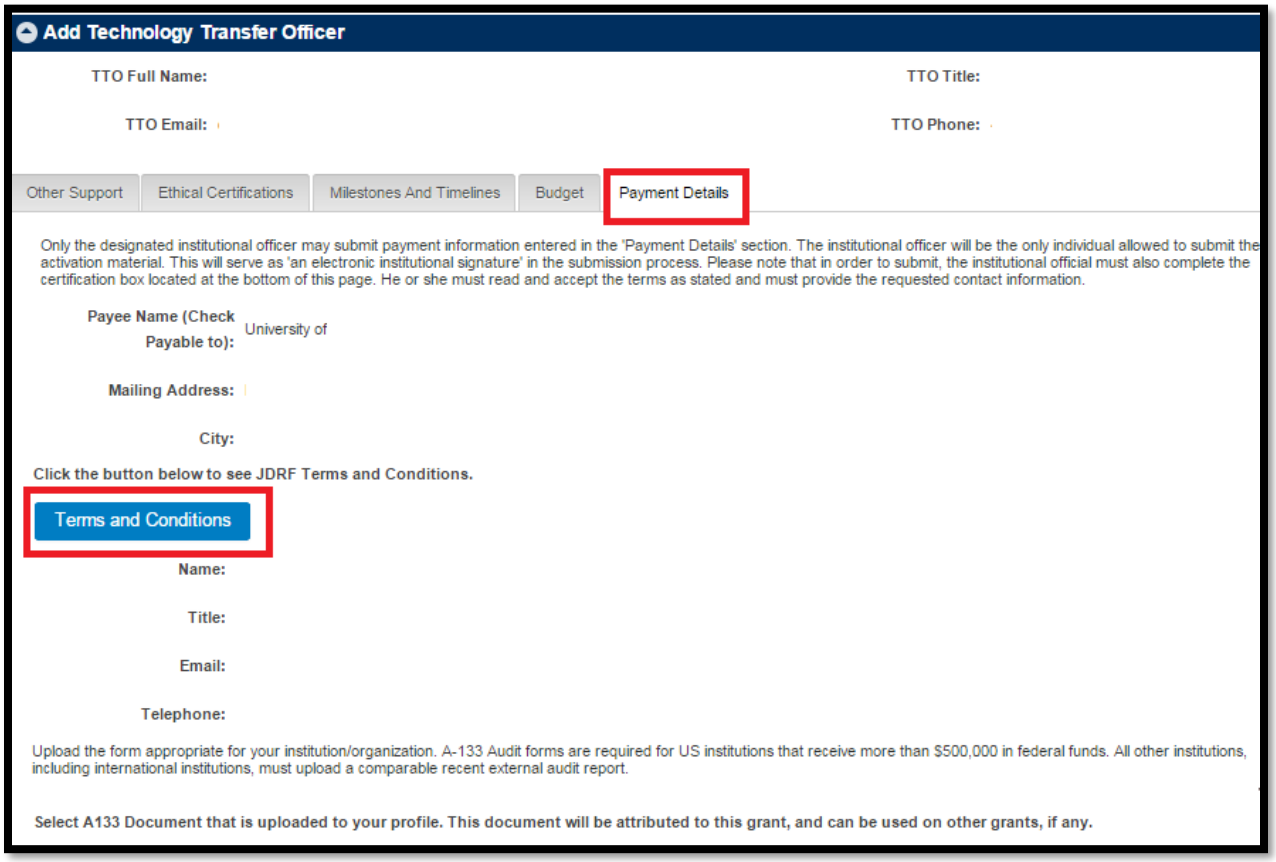
1. **How do I view the Terms and Conditions (T&Cs) of the award?**
   Roles: The following steps are for the Research Officer (RO).

The terms and conditions are made available to the RO at the time of an activation or renewal, in which the RO reviews and agrees via an electronic signature to JDRF's T&Cs. If the RO wishes to view the T&Cs after a grant has been activated or renewed, the RO must follow the steps below.

Step 1. The RO logs in to RMS360, clicks on the "Proposals/Grants" Tab and selects the award's 'Project Title' to view the T&Cs.



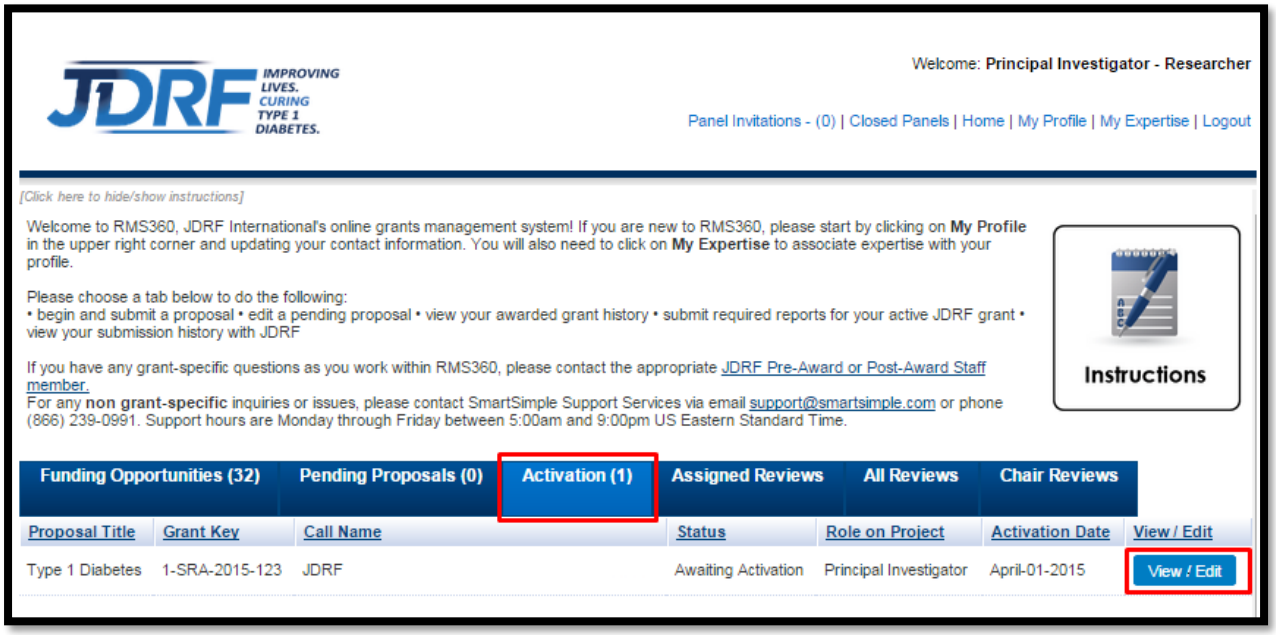
Step 2. Once the award page loads, the 'Payment Details' tab must be selected and the 'Terms and Conditions' can be found towards the bottom of the page.



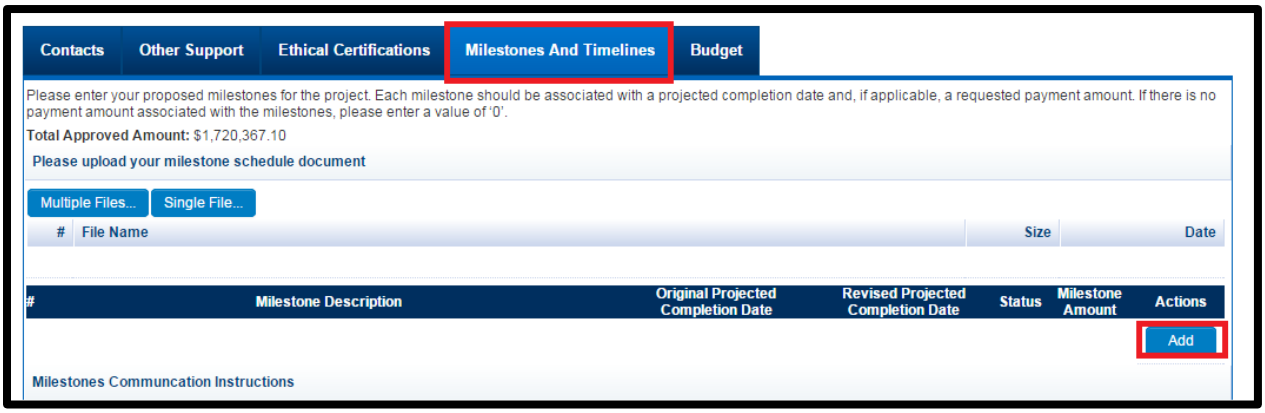
Milestones

1. **How do I add milestones to my activation?**
   Roles: The following steps are for the Principal Investigator (PI).

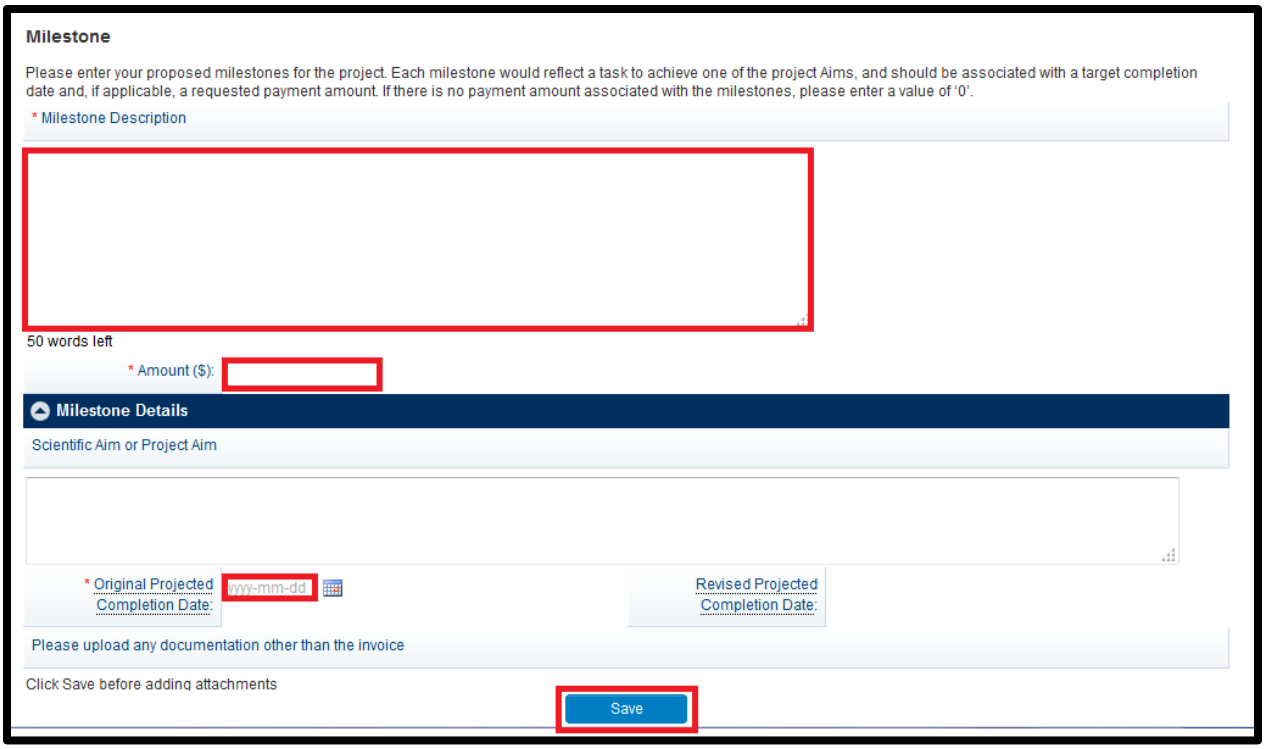
Step 1. Log into RMS360 and navigate to the 'Activations' tab and click on the 'View/Edit' button.



Step 2. Once in the Activation, navigate to the 'Milestones' tab and click on the 'Add' button.

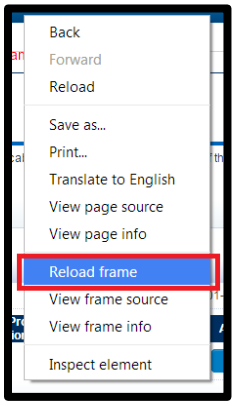


Step 3. A new window will pop up – enter the information regarding the milestone (Milestone Description, Amount, Original Projected Completion Date) and click on 'Save'.

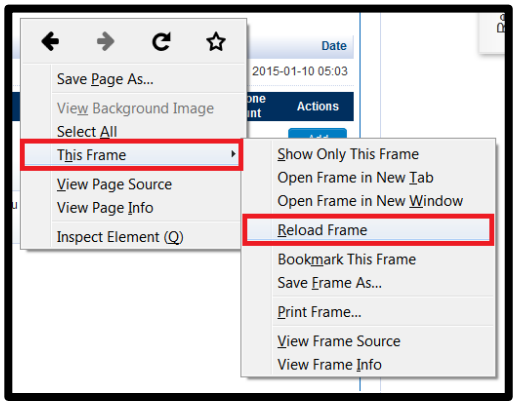


Step 4. After clicking on 'Save', close the pop up window to go back to the main Activation screen.

Step 5. If using Google Chrome, right-click, then choose 'Reload Frame'. (If using Mozilla Firefox, right-click, then choose 'This Frame', then 'Reload Frame').

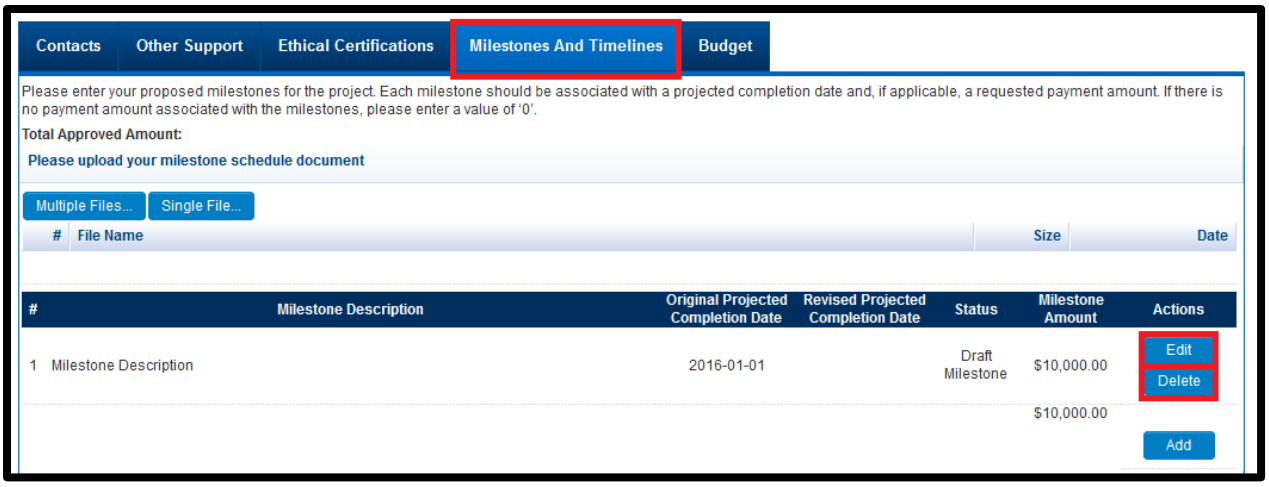


Google Chrome right-click menu



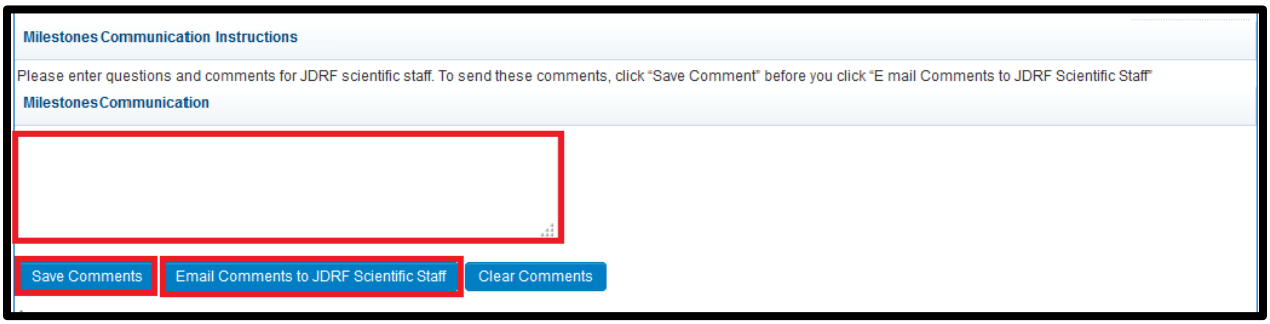
Mozilla Firefox right-click menu

Step 6. Navigate back to the 'Milestones' tab – you should see the milestone you just added. If edits are required, click on the blue 'Edit' button or 'Delete' if you wish to delete a milestone.



Step 7. Continue this process until all milestones are added.

Step 8. If PI needs to communicate with the JDRF Scientific Program Manager regarding milestones, the PI can use the "Milestones Communication" text box. Type the necessary communication to JDRF, then click on 'Save Comments', then 'Email Comments to JDRF Scientific Staff'.

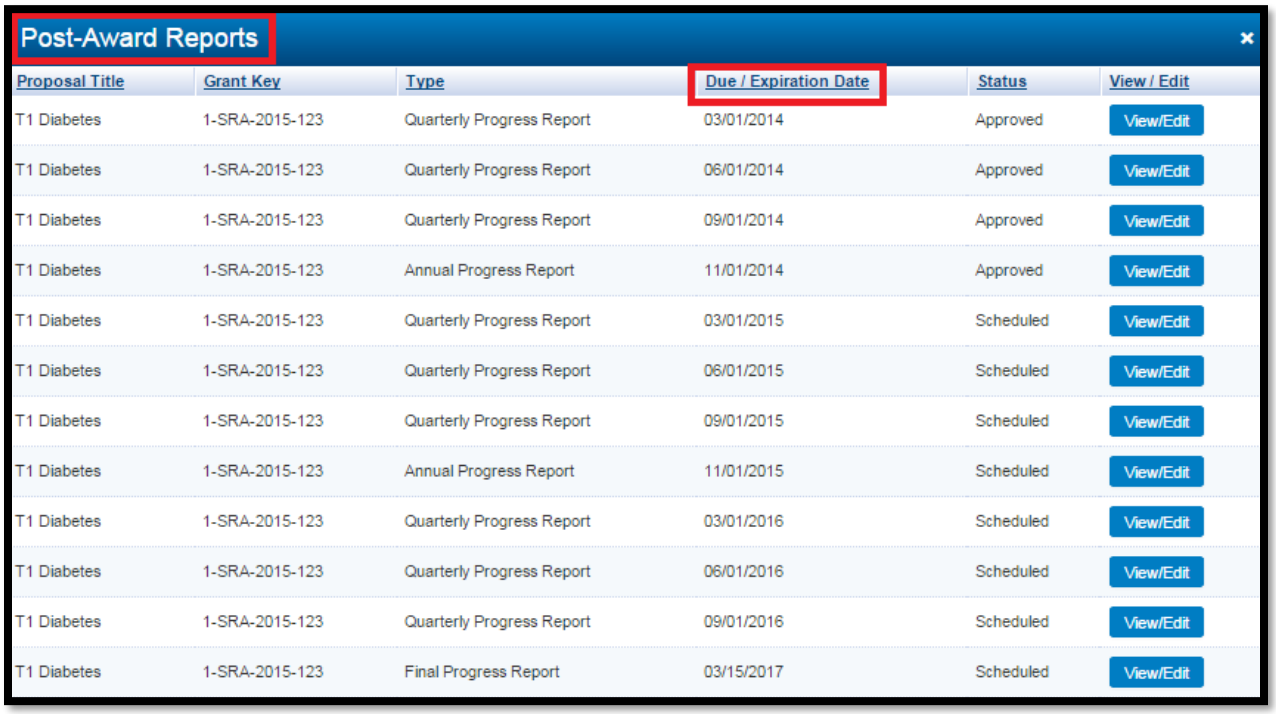


2. **How do I make changes to my milestones after my award has been activated/renewed?**
   Please contact the JDRF Scientific Program Manager to make any changes.

Monitoring and Reporting

1. **How do I view when my reports are due?**
   Roles: The following steps are for the Principal Investigator (PI), Research Officer (RO), and Financial Officer (RO).

PI: The PI can view all due dates for Post-Award Reports by logging in to RMS360 and selecting "Post-Award Reports".

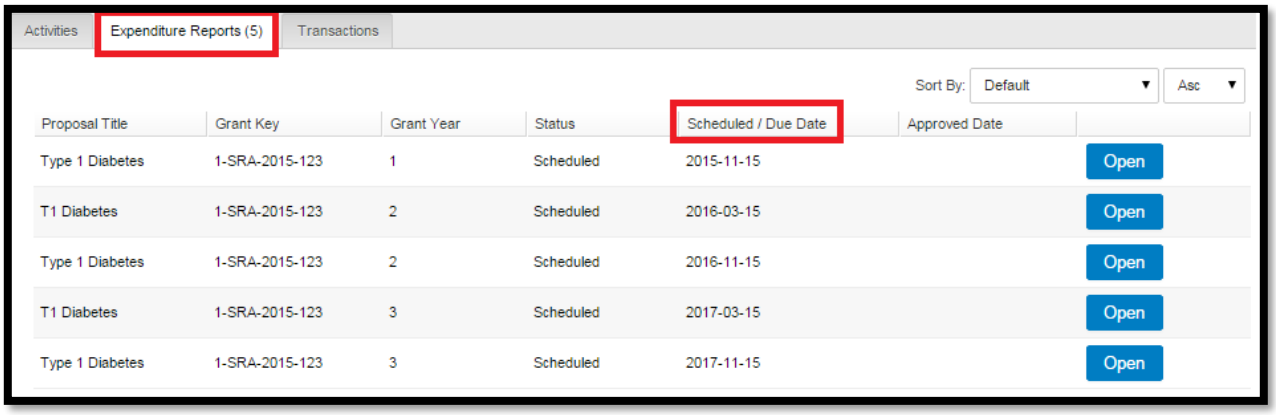


Post-Award Reports

Proposal Title	Grant Key	Type	Due / Expiration Date	Status	View / Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	03/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	06/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	09/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Annual Progress Report	11/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	03/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	06/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	09/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Annual Progress Report	11/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	03/01/2016	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	06/01/2016	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	09/01/2016	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Final Progress Report	03/15/2017	Scheduled	View/Edit

RO: The RO portal does not show the report due dates as all reports are either initiated in the PI or FO portal. Instead, the RO will coordinate with the PI to be informed of the due dates for the Post-Award Reports. The RO will coordinate with the FO to be informed of the due dates for the Expenditure Reports.

FO: The FO can view all due dates for Expenditure Reports by logging in to RMS360 and selecting "Expenditure Reports".



Activities | Expenditure Reports (5) | Transactions

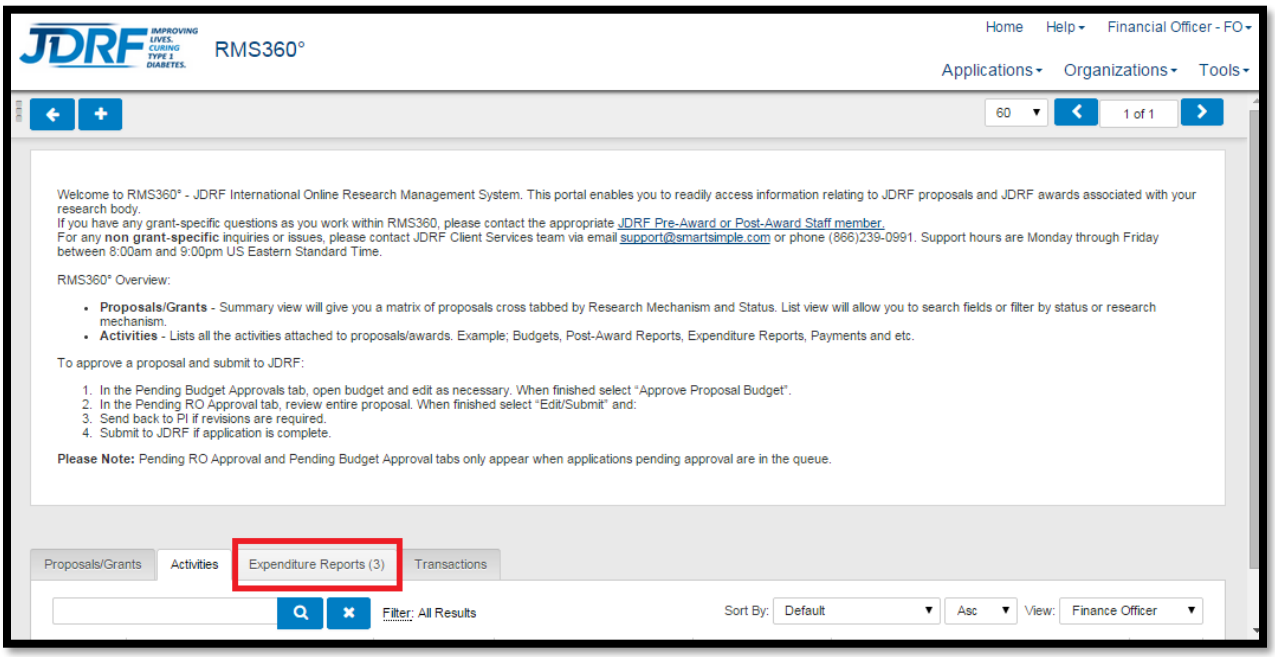
Sort By: Default Asc

Proposal Title	Grant Key	Grant Year	Status	Scheduled / Due Date	Approved Date	
Type 1 Diabetes	1-SRA-2015-123	1	Scheduled	2015-11-15		Open
T1 Diabetes	1-SRA-2015-123	2	Scheduled	2016-03-15		Open
Type 1 Diabetes	1-SRA-2015-123	2	Scheduled	2016-11-15		Open
T1 Diabetes	1-SRA-2015-123	3	Scheduled	2017-03-15		Open
Type 1 Diabetes	1-SRA-2015-123	3	Scheduled	2017-11-15		Open

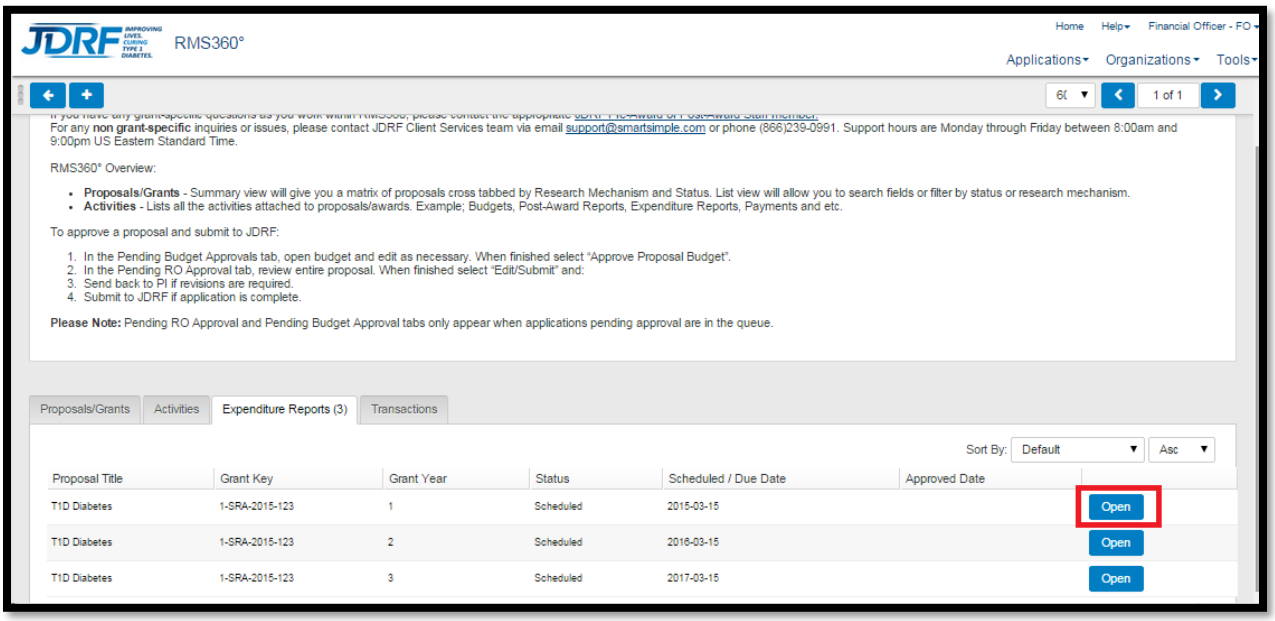
2. How do I submit an Expenditure Report?

Roles: The following steps are to be completed by the Finance Officer (FO) and Research Officer (RO):

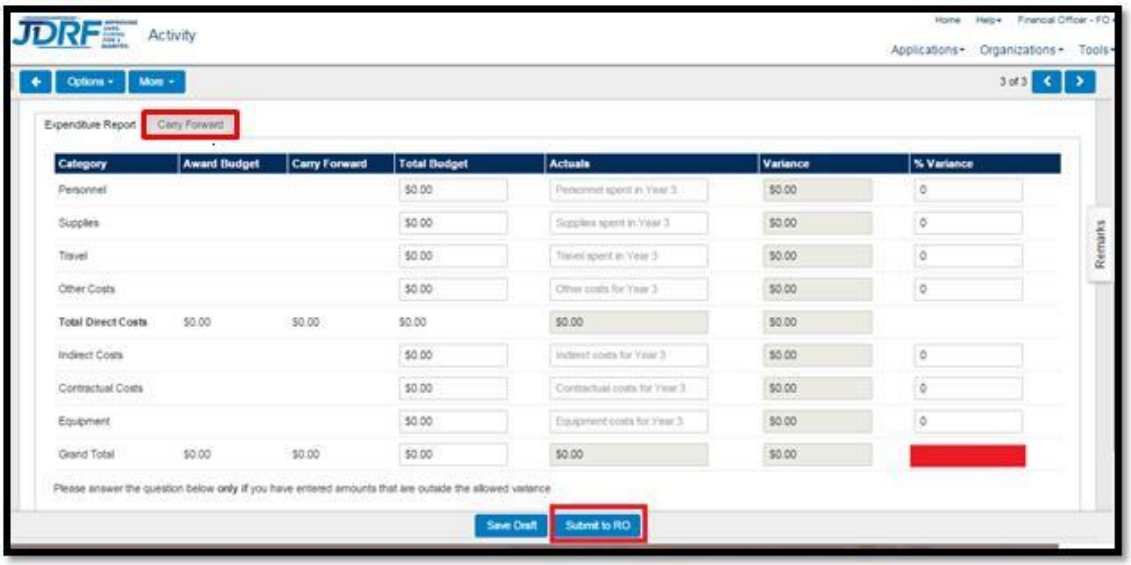
Step 1. Select the tab marked 'Expenditure Reports'. Click on 'Expenditure Reports':



Step 2. A new window will pop up and you will see a list of Expenditure Reports due. Click on the blue 'Open' button to the right to open an expenditure report.



Step 3. Once the ER opens, complete the form (scroll down). For any variance highlighted in red, please include a justification. For any unexpended funds, complete the Carry Forward tab. Once you are done, click on the 'Submit to RO' button at the bottom of the screen:



Step 4. The RO reviews and submits the Expenditure Report to JDRF.

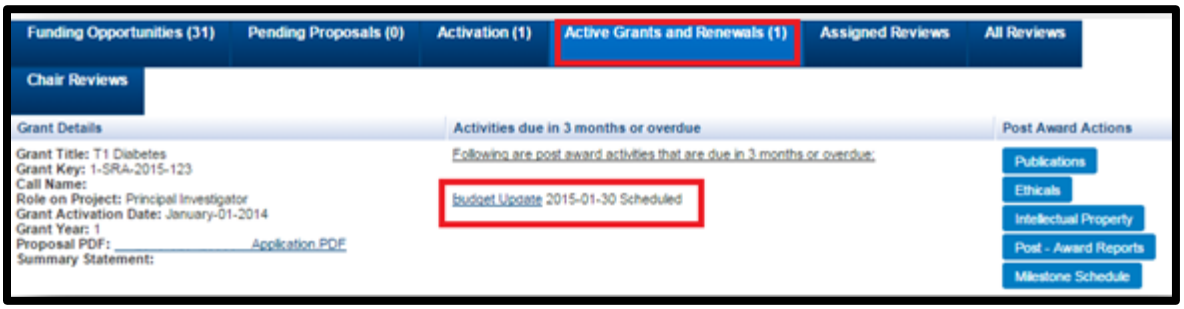
Budget Update

1. **How do I request/submit a budget update?**
   Roles: The following steps are to be completed by the Principal Investigator (PI) and Research Officer (RO).

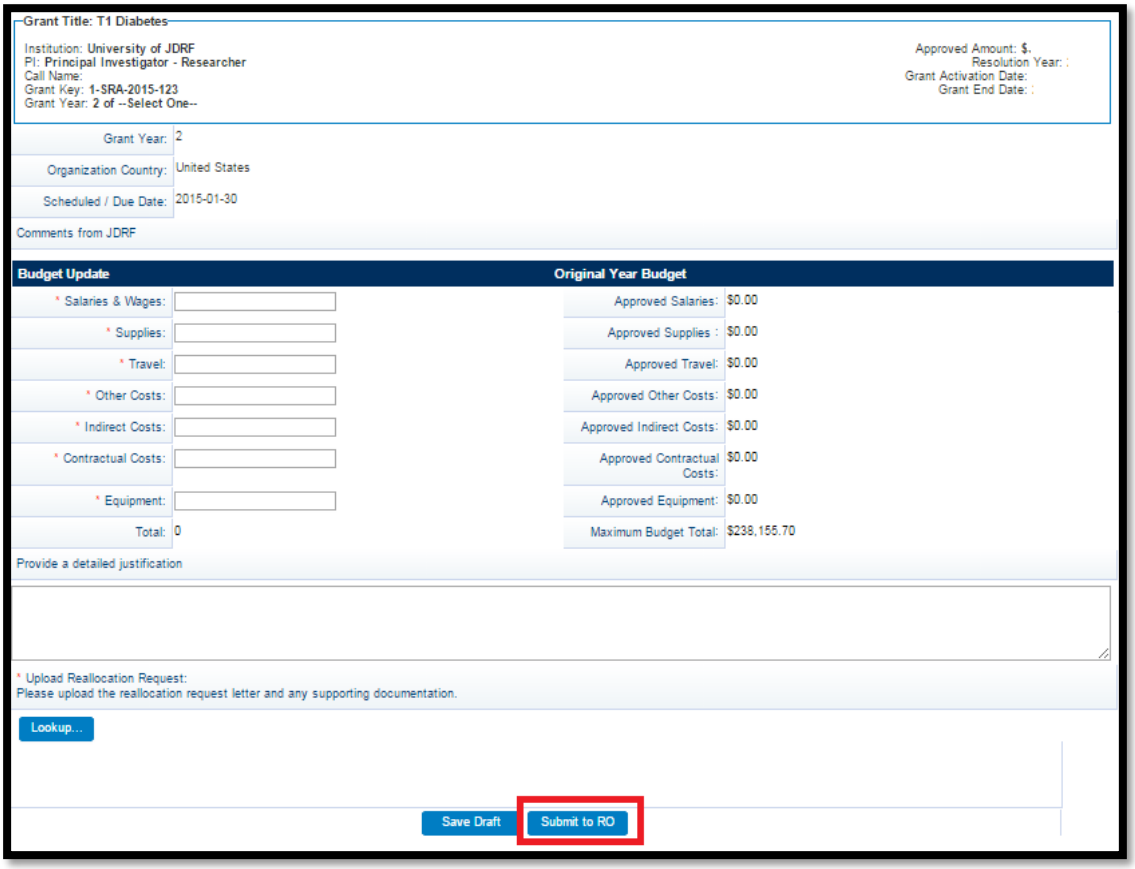
   Step 1. The PI must email first email the JDRF Grant Administrator to request permission to complete a budget update.

   Step 2. The JDRF Grant Administrator will email the PI once the budget update is created in RMS360.

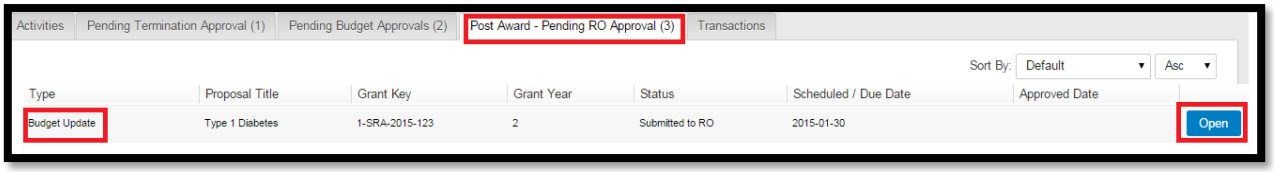
   Step 3. The PI logs in to RMS360 and selects "Budget Update".



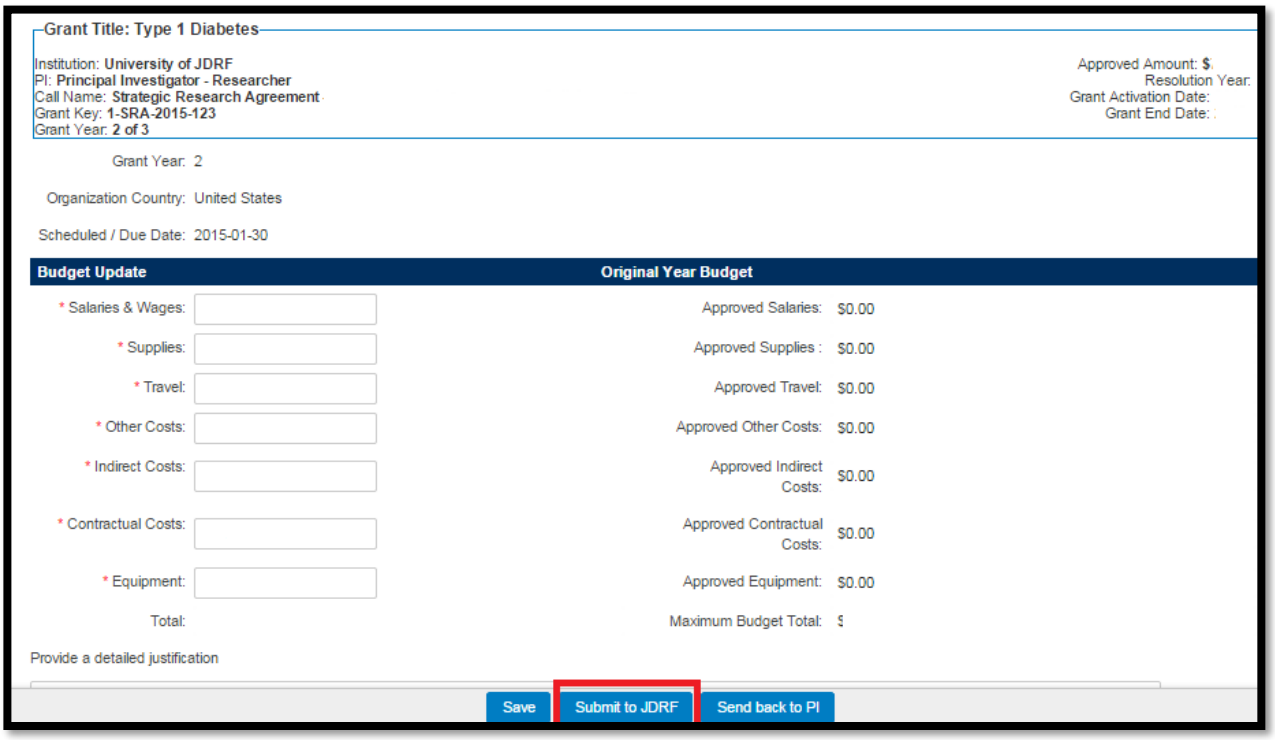
   Step 4. The PI completes the budget update and once that is done, the PI clicks on the button at the bottom of the screen 'Submit to RO'.



Step 5. The RO logs into RMS360, selects 'Post-Award – Pending RO Approval, and 'Opens' the budget update.



Step 6. The RO reviews the budget update. If revisions are required, click on the button at the bottom of the screen, "Send back to PI". If acceptable, click "Submit to JDRF".

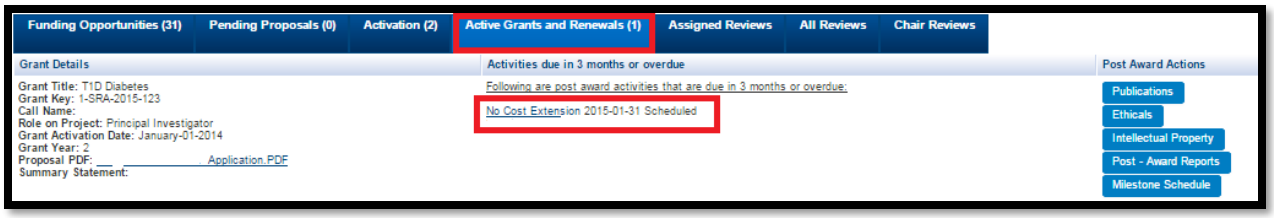


No-Cost Extensions

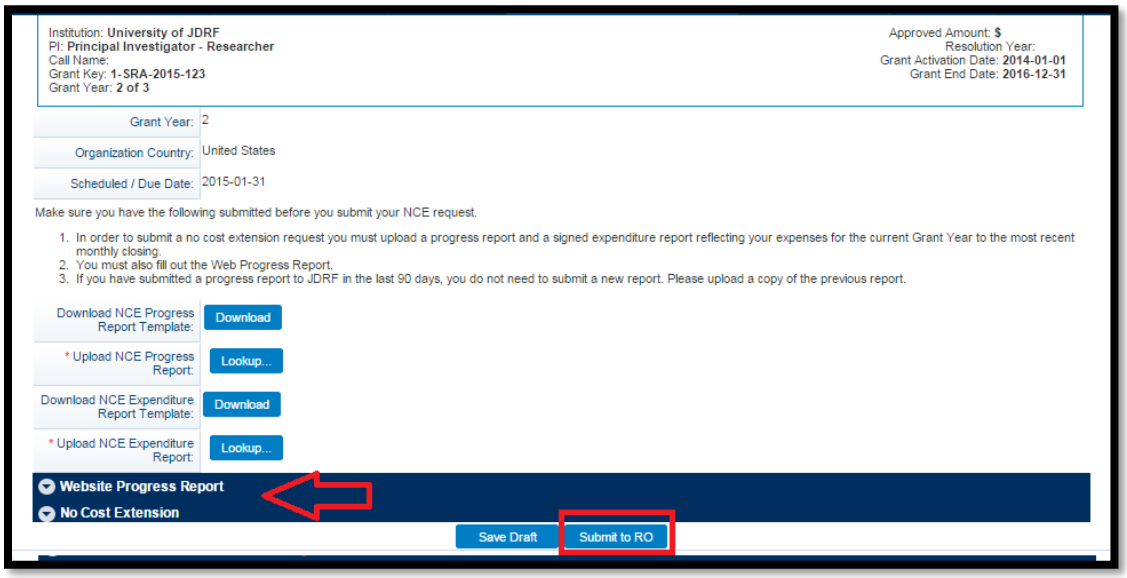
1. **How do I submit a No-cost Extension (NCE)?**
   Roles: The following steps are to be completed by the PI and the RO.

Step 1. A No-Cost Extension link will appear in the PI portal 90 days prior to the grant end date. If the PI does not see the link, contact the JDRF Grant Administrator and notify them that you do not see the link.

Step 2. The link for an NCE request is located under *Active Grants and Renewals* tab under the "Activities due in 3 months or overdue" column. The due date will also appear next to the link.

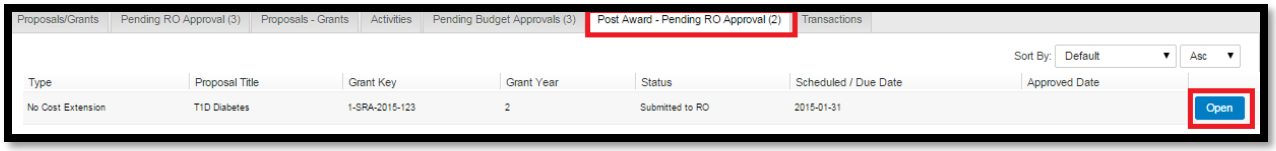


Step 3. PI Completes Web Progress Report and No-cost Extension fields and clicks "Submit to RO"

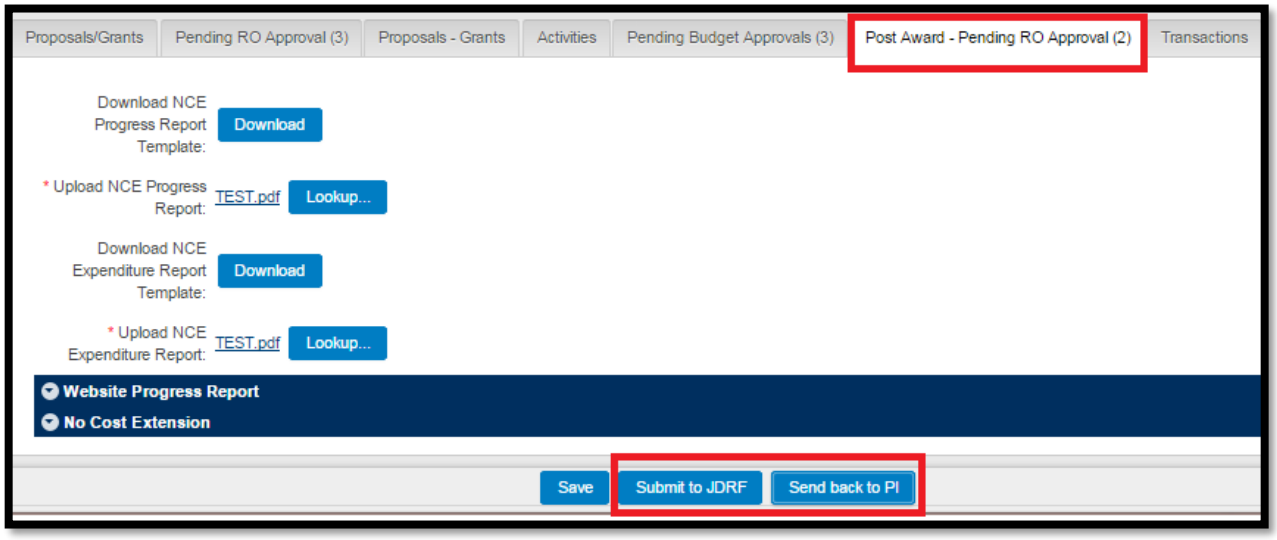


The following steps are to be completed by the Research Officer (RO):

Step 4. Select the *Post Award-Pending RO Approval* tab and click "Open"



Step 5. Review the Web Progress Report and No-cost Extension information. If revisions are required, click "Send back to PI". If acceptable, click "Submit to JDRF".



Step 6. No-cost Extension Request has been submitted successfully.

Transfers

1. **How do I request a transfer?**
   Roles: The following steps are to be completed by the Principal Investigator (PI).

   Step 1. The PI must first email the JDRF Grant Administrator and request a transfer as soon as the PI becomes knowledgeable of his/her transfer.

   Step 2. The JDRF Grant Administrator will email the PI with further instructions and steps to initiate the transfer.

   - **Step a.** The PI will need to complete a Termination activity in RMS360 for the former institution.
   - **Step b.** The PI will need to submit a Transfer application under the new institution.

Transition

1. **How do I request a transition?**
   Roles: The following steps are to be completed by the Principal Investigator (PI).

   Step 1. The PI must first email the JDRF Grant Administrator to request a transition award, as soon as the PI becomes knowledgeable of his/her new faculty appointment.

   Step 2. The JDRF Grant Administrator will email the PI with further instructions and steps to initiate the transition, if approved.

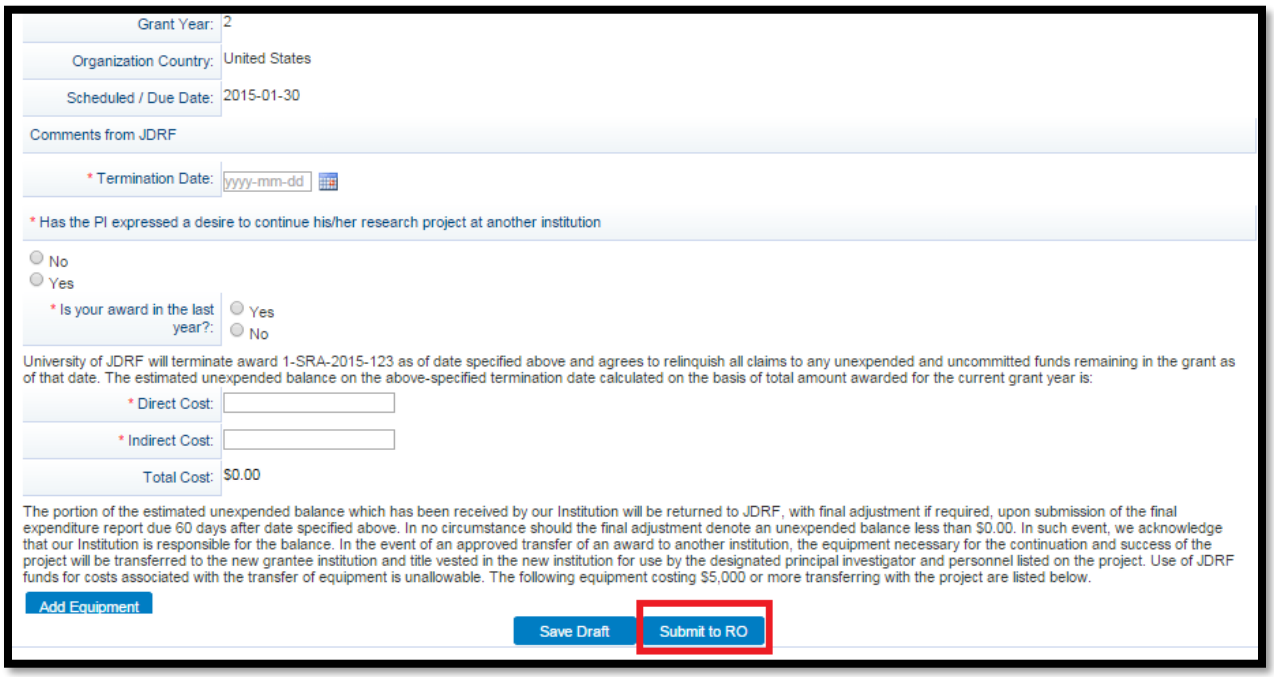
   - **Step a.** The PI will need to complete a Termination activity in RMS360 for the former institution.
   - **Step b.** The PI will need to submit a Transition application under the new institution.

Termination

1. **How do I complete the termination activity?**
   Roles: The following steps are to be completed by the Principal Investigator (PI) and Research Officer (RO).

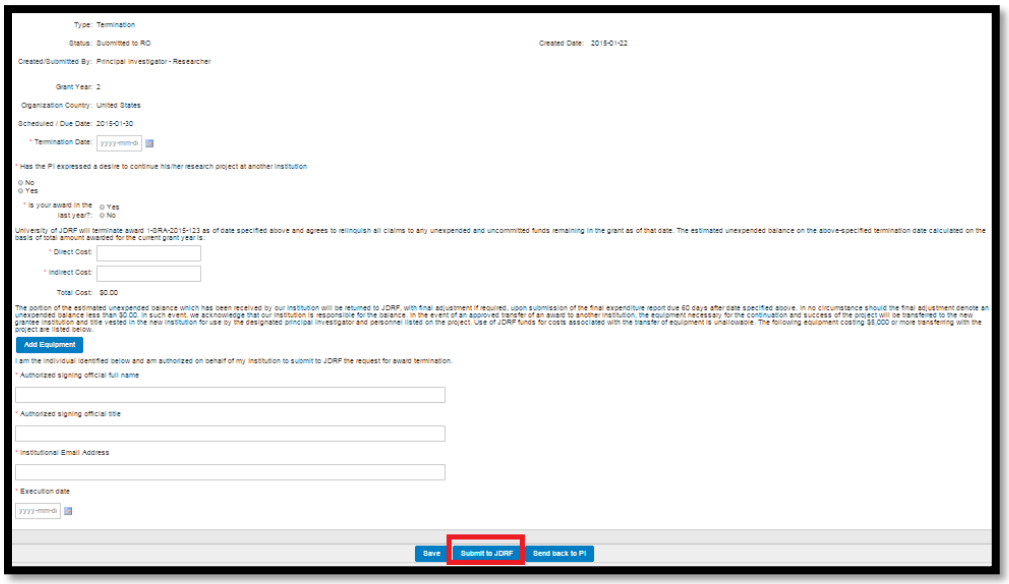
   Step 1. The PI must first email the JDRF Grant Administrator to initiate a termination.
   Step 2. The JDRF Grant Administrator will email the PI once the termination activity is created in RMS360.
   Step 3. The PI logs in to RMS360 and selects "Termination".

   Step 4. The PI completes the termination and once that is done, the PI clicks on the button at the bottom of the screen, 'Submit to RO'.



   Step 5. The RO logs into RMS360, selects 'Pending Termination Approval', and 'Opens' the Termination.

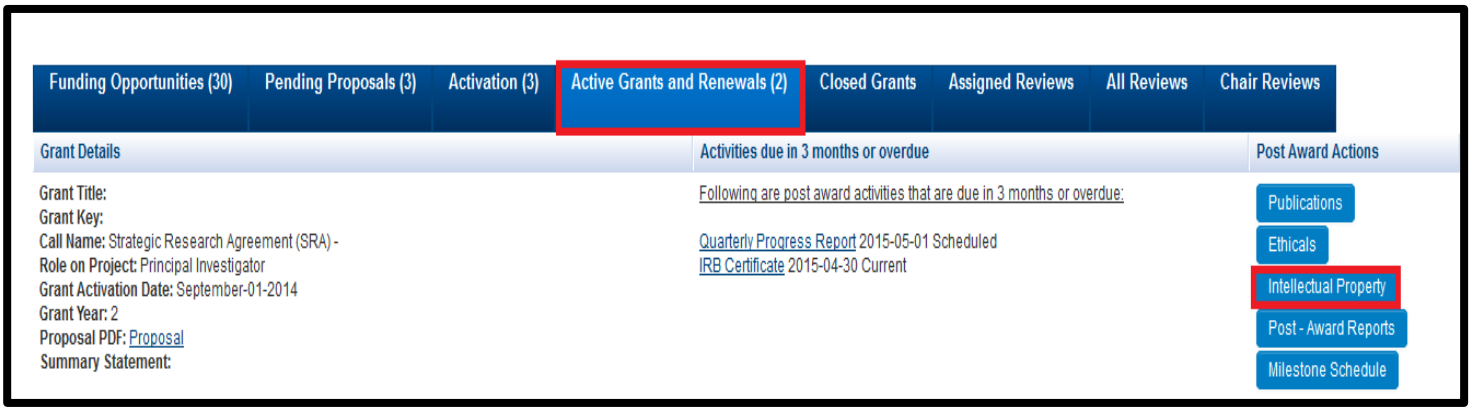
Step 6. The RO reviews the termination, and then clicks on the button at the bottom of the screen, 'Submit to JDRF'.



Intellectual Property

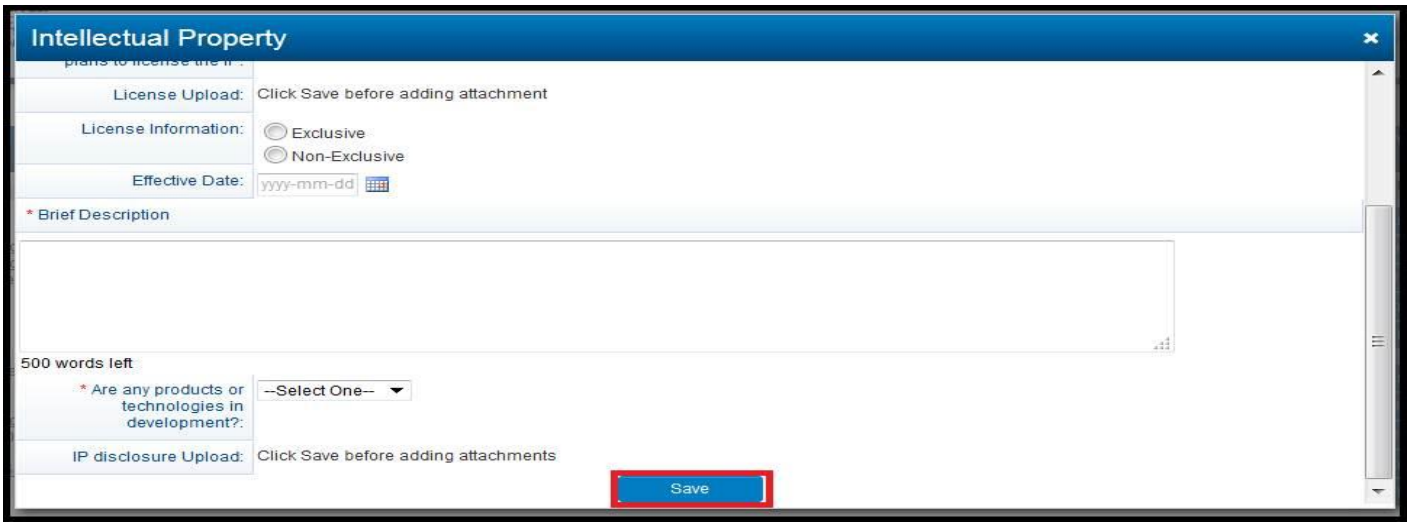
1. **How do I add Intellectual Property?**
   Roles: The following steps are to be completed by the Principal Investigator (PI) or Research Officer (RO).

   Principal Investigator:
   Step 1. The PI logs in to RMS360 and selects "Intellectual Property".



Step 2. A new window will open where you can select the 'Create New" button

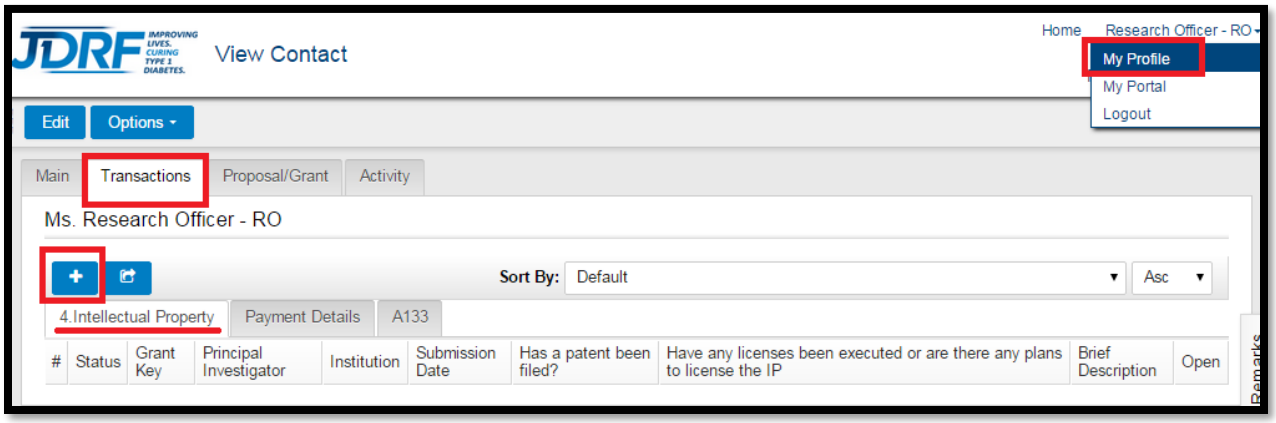
Step 3. The PI will complete the required fields, and once complete, the 'save' button should be selected at the bottom of the screen.



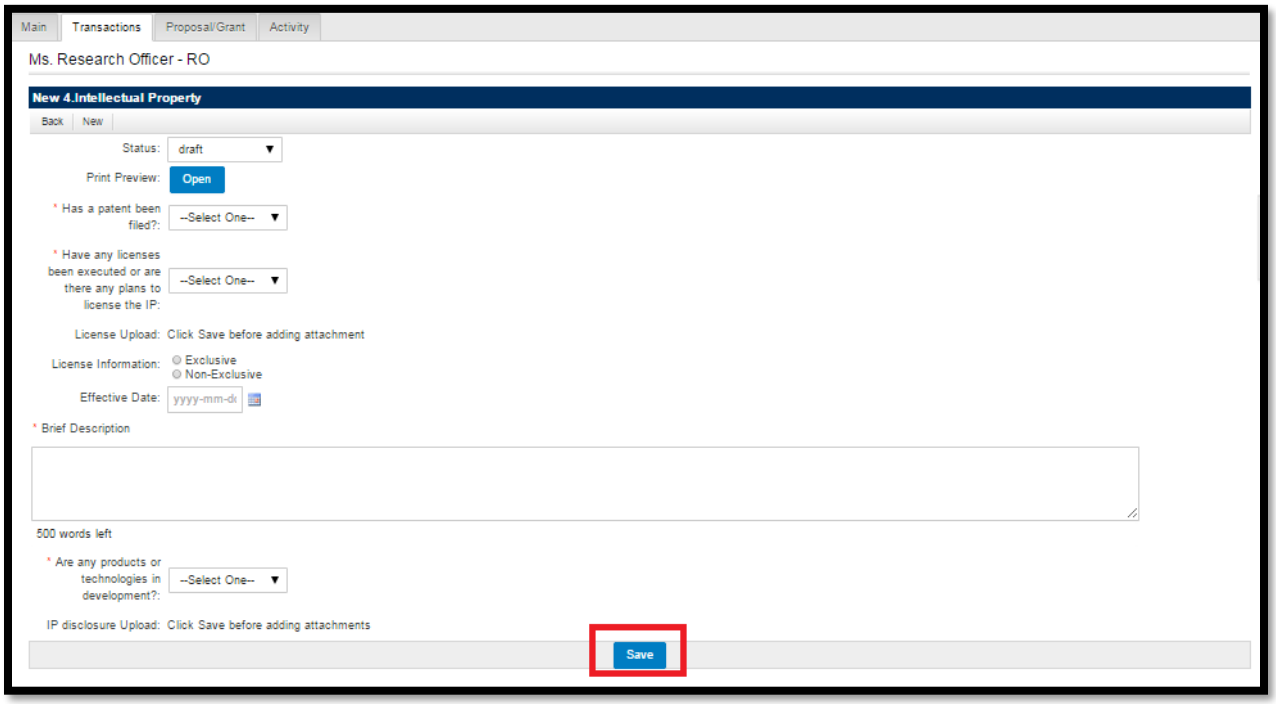
Step 4. Once the required files have been uploaded, the PI will select the submit button to formally submit to JDRF.

Research Officer:

Step 1. The RO logs in to RMS360 and selects "Transactions" under *My Profile* link. Under the Intellectual Property tab, select "New" to add details [make sure you are clicking on the symbol, "+"].



Step 2. The RO will complete the required fields, and once complete, the 'save' button should be selected at the bottom of the screen.



Step 3. Once the required files have been uploaded, the RO will select the submit button to formally submit to JDRF.